


Request Form Details

Request Tabs

Request Details

The Request Details tab contains fields relevant to moving the request process forward as well as fields that will be copied over to the related new project that eventually gets created.

After the Requestor clicks the **Submit** switch on the Request Details tab, an email with request details will be sent to the Request Submitter, Approvals Coordinator and the nominated Approvers.

Request Details Project Details Approvals History Related ▾					
Request Details					
Request Reference	Req-003550	Project Description and Purpose	---	Out of Scope	---
Request Template	*  Product Update	Project Objectives	---	Support Project Type	---
Title	* Project Acme	Economic Impact	---	Submit Request	<input checked="" type="radio"/> No

Note When the back arrow is clicked while on the Request Details tab, the Request form will reload rather than load the view or record from which you opened the request record.

Project Details

The **Project Details** tab in Requests will be visible for users given the **BrightWork Team Member** security role.

The values for the following fields in Project Details can be specified in the Project Template and will automatically populate the corresponding columns in the Project Details tab of new Requests:

- Content Template
- Portfolio
- Program
- Project Manager
- Project Sponsor
- Project Type

Project Acme - Saved
Request · Product Update

Project Acme Name

Request 2 Approvals
Active for less than one mi.

Draft (< 1 Min)

Accepted

Request Details Project Details Approvals History Related

Project Template * Product Update

Content Template Content Template from Danista Proj...

Submit Date

Group Manager

Project Name ---

Project Manager Anne Wallace (Offline)

Project Sponsor Alex Hankin (Offline)

Portfolio ACME Portfolio

Program ACME Program

Project Type Strategic

Approvals

Tip Also see the [BrightWork Approvals](#) article for info about a dedicated Admin Area section to manage Request and Project approvals.

The **Approvals** tab in Requests will be visible for users given the **BrightWork Approvals Coordinator** security role.

Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the Approvals tab. The default settings are controlled by the configuration that is set in **Templates Area | Request Templates**.

Project Acme - Saved
Request · Product Update

Project Acme Name Draft Request Status

Request 2 Approvals
Active for less than one mi.

Draft (< 1 Min)

Accepted

Approved

Request Details Project Details Approvals History Related

Approvals Detail

Approvals Coordinator* Jonathan Weisglass (Busy)

Request Template* Product Update

Auto-create Project

Draft to Accepted

Approvers Caltriona O'Connor

Additional Approval Email Text

Approval Start* Manual

Accepted to Approved

Approvers Donal McCarthy

Additional Approval Email Text

Approval Start* Automatic

Approvals Coordinator

The Approvals Coordinator helps to keep the approval process moving along. The Approvals Coordinator field is a lookup field and security role. This user must be given the BrightWork Approvals Coordinator security role in addition to being selected as the Approvals Coordinator in the Request Template.

The Approvals Coordinator does not make approval decisions; all stage approvals are done

by the nominated Approvers. The Approvals Coordinator also does not move the process from one stage to the next via the Business Process Flow; this must be done via approvals completed by the nominated Approvers.

The Approvals Coordinator will be sent approval related notifications.

Create Project

The **Create Project** toggle button will appear in the Approvals tab of a request that has been configured to not auto create projects. The Approvals Coordinator can toggle the button to create a project when the button becomes enabled.

The screenshot shows the 'Request 2 Approvals' interface. At the top, a progress bar indicates the status: Draft (checked), Accepted (checked), and Approved (16 Min) (checked). Below the progress bar, the 'Approvals' tab is selected. The 'Approvals Detail' section shows the Approvals Coordinator as Jonathan Weisglass (Busy). The Request Template is 'Project Request 2 Approval'. The 'Auto-create Project' checkbox is unchecked. The 'Create Project' toggle is set to 'No'.

Approval Start

If **Approval Start** is set to **Automatic**, the approval process starts as soon as the previous approval gets approved.

If **Approval Start** is set to **Manual**, the Approvals Coordinator gets notified that they have an approval to manually start after the previous approval gets approved, and the **Start Approval** button on the **Approvals** tab will become enabled.

The screenshot shows the 'Project Orange' interface. At the top, a progress bar indicates the status: Draft (checked), Accepted (< 1 Min) (checked), and Approved (checked). Below the progress bar, the 'Approvals' tab is selected. The 'Approvals Detail' section shows the Approvals Coordinator as Jonathan Weisglass (Busy). The Request Template is 'Project Request 2 Approval'. The 'Auto-create Project' checkbox is unchecked. The 'Start Approval' toggle is set to 'No'.

History

The History tab displays a history of the approvals process.

Request 2 Approvals

Active for 24 hours

<

Draft (24 Hrs)

Accepted

Request Details

Project Details

Approvals

History

Related

<input type="checkbox"/>	Name	Stage	Outcome	Date	Comment
	Jonathan Weisglass	Draft to Accepted	Submitted	1/24/2023 8:42 ...	Request Submitted
	Anne Wallace	Draft to Accepted	Approve	1/24/2023 8:45 ...	
	Dan Bacon	Draft to Accepted	Approve	1/24/2023 8:47 ...	